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ABSTRACT

This handbook, based on a questionnaire concerning operation and management issues submitted to each ERIC Clearinghouse during Spring 1981, presents satisfaction ratings for the major areas of ERIC Clearinghouse operation, lists the problems identified in particular areas of operation, and presents the solutions to the identified problems suggested by particular clearinghouses during the survey. The handbook is divided into sections covering RIE (Resources in Education) and CIJE (Current Index to Journals in Education) processing practices, computer searching, vocabulary review, facilities/equipment, user services, IAPs (Information Analysis Products), professional linkages, support sources, special projects, budget management, advisory boards, staff development, and public relations. Within each section, problem statements are listed in alphabetical order, followed by the solutions to these problems suggested by individual clearinghouses. A level of satisfaction rating (based on a scale of one to five) provided for each area is the average of the rankings reported by the 16 clearinghouses. (Author/JL)

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Handbook

of

Effective ERIC

Clearinghouse Practices

IR010145

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FOREWORD

Whenever personnel from the ERIC Clearinghouses are together, sooner or later they start discussing common problems and sharing ideas about how to solve them. In an attempt to make these informal conversations orderly and useful, CAPS took on as a special project the task of collecting and organizing into a single volume the best of all the Clearinghouse practices. This Handbook is the result.

In the spring of 1981 CAPS disseminated to each Clearinghouse an extensive questionnaire about all phases of our operation and management. Each Clearinghouse was asked to (a) indicate the level of staff satisfaction with a particular area, (b) identify any problems in that area, and (c) describe what had been done to resolve them. The CAPS staff then analyzed the data, integrated concerns of a similar nature into one succinct statement, and listed solutions as often as possible just as they were expressed by each Clearinghouse in the questionnaire. Prior to final assembly, the material was reviewed and approved by Central ERIC.

Because the operation of an ERIC Clearinghouse is in a continual state of refinement and improvement, the Handbook is arranged in loose-leaf format so that Clearinghouses can add or delete pages as policy and procedures change. The sections within the Handbook appear as they did in the questionnaire. A title page precedes each section with a Level of Satisfaction rating. Based on a scale of one to five (low = 1, high = 5), the number is an average of the Clearinghouse rankings for each area designated on the questionnaire. This Level of Satisfaction rating represents overall Clearinghouse satisfaction with the particular area.

Within each section, the problem statements are arranged in alphabetical order, followed by Clearinghouse-generated solutions listed in random order. No attempt has been made to rank problems or solutions in any kind of priority or frequency, as the level of importance, after all, is in the eye and mind of the reader. Following each solution are the initials of the Clearinghouse(s) which suggested it. The purpose

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of referencing the solution is to provide a contact for further exploration of a procedure of particular interest. No individual names have been indicated because of the possibility of the staff member's leaving ERIC or the reassignment of tasks within each Clearinghouse.

The Handbook is a compilation of real and practical issues facing an ERIC Clearinghouse because it has been created by staff persons directly involved in Clearinghouse functioning. Although some problems or solutions may be unique to a particular Clearinghouse, we believe that a thorough study of specific areas of interest will yield information of potential benefit. The rainbow on the cover symbolizes the supreme individuality of each of the 16 Clearinghouses, as well as their harmony and unity as part of the total ERIC system. This Handbook is an example of that unity because it is truly a joint effort of all of us.

We wish to express our sincere appreciation to all of you for your responses to our call for your best thinking. Here at CAPS we are highly pleased with the range and substance of information the Handbook contains and hope that all the Clearinghouses will find it useful as they work to enhance the efficiency and effectiveness of their own performance.

Garry R. Walz
Director, ERIC/CAPS

RIE Processing

Acquisitions

Level of Satisfaction: 4.17

Problem: Document Quality

- change of emphasis in scope areas
- prevalence of roundtable discussions over scholarly papers
- large number of documents with limited or local interest
- overlap in scope areas

Solutions

1. Review usefulness of documents from "tried and true" sources. (FL)
2. Eliminate marginal types of acquisitions. (FL, IR)
3. Create an external validation procedure, e.g., a small advisory board to examine acquisition/ selection procedures. (EC)
4. Contact other CH's when scope overlap is in question. (CG)
5. Gather input from advisory board and professional association members about trends in scope area. (CG, IR)

Problem: Identification of Document Sources

- maintenance of total coverage of scope area
- handling of bills for submitted materials
- low productivity in field
- addresses of conference presenters
- diminished relevance and/or funding of sources
- tendency to rely on "tried and true" sources
- irregular supplies of newsletters and bibliographies

Solutions

1. Set up acquisition networks within scope areas. (RC)
2. Use liaison contacts with professional organizations. (HE, RC)
3. Request cancellation of bills by phone and/or return bill with a letter indicating a date after which CH assumes bill is cancelled, or offer to return the item. (EA)
4. Request address lists/mailing labels from conference coordinators or sponsoring organizations. (CG, TM)
5. Review annual foundation reports to identify funding recipients. (TM)
6. Request journal editors to inform authors of rejected (but good) manuscripts about ERIC. (CG, SP)

7. Have abstractors scan bibliographies and references for likely sources. (SP)

8. Review all institutional acquisitions arrangements. (FL)

9. Share resources (newsletters, etc.) with other projects within supporting organization. (CE)

10. Initiate an "exemplary student paper contest" through directors of graduate programs in scope area. (HE)

11. Search ERIC by source code and provide organizations with a printout of input from last two years to determine if any materials are missing from ERIC. (HE)

12. Attempt to locate replacement agencies when funding cutbacks occur. (EC)

13. Monitor state and federal projects within scope area, as well as regional, local and international sources. (PS, SE)

14. Set up a monthly file of upcoming conferences. (CG)

15. Maintain contacts with previous contributors. (JC)

16. Develop a "Conference Paper Automatic Collection Kit" that provides a step-by-step procedure for getting professional associations to assist in document solicitation/collection. (EC)

Problem: Low Response Rate

- inappropriate format of conference speeches, e.g., speaker's notes or overhead projector outlines
- amount of time for follow-up of solicitation efforts
- decrease in document submissions

Solutions

1. Broaden conference solicitation. (CS)
2. Send "reminder" flyer (self-mailer) to selected portions of mailing list. (HE)
3. Establish standing arrangements with professional associations to encourage their members to submit conference papers. (HE, TM)
4. Request space in convention program for announcement of "requests for papers." (HE, TM)
5. Screen newsletters for possible documents and conference announcements. (CG, JC)
6. Call authors before actual conference to determine if presentations are written. (SO)
7. Include Clearinghouse and/or Facility acquisitions brochure with each solicitation letter. (CG)
8. Use mass mailings to specialized groups. (EA)

9. Place acquisition advertisements in scope area journals. (SP)

10. Use word processing equipment to make correspondence more attractive and "personal." (FL)

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Problem: Reproduction Releases

- misunderstanding of form
- Level III materials
- receipt of documents without release forms

Solutions

1. Send form letter to organization/association director asking about policy on reproduction releases and encouraging at least a Level II release to ERIC. (CG, HE, SO)

2. Examine the usefulness of creating a standard, system-wide explanation letter to accompany release form. (UD)

Problem: Staff Time

- follow-up efforts
- coverage of scope areas

Solutions

1. Provide dictating equipment to utilize staff time better. (RC)
2. Experiment with form letters. (RC)
3. Develop short, succinct form letters and include CH and/or Facility acquisitions brochure with each solicitation letter. (CG, UD)
4. Set aside specific times in CH each week for acquisition efforts. (JC, RC, SP)
5. Use word processor to personalize letters and target particular items/groups. (IR, FL)

RIE Processing

Screening

Level of Satisfaction: 4.39

Problem: Content Analysis

- duplication of other materials
- value of "short" documents
- repetitive nature of documents
- educational applicability
- overlap in scope areas

Solutions

1. Redesign screening worksheet to include specific rejection causes. (CE)

2. Run a computer search to identify duplication with materials already in ERIC, but monitor cost effectiveness. (SO)

3. Encourage abstractors to form opinions about documents and question the quality.

4. Share acquisition lists with other CH's and/or call about specific documents. (CG, FL, RC, UD)

5. Get input on materials' educational applicability from professional staff, advisory board members, and subject experts. (RC)

Problem: Document Flow

- volume of documents
- turnaround time with reviews
- increased submission of copywritten/Level III materials
- limited staff time

Solutions

1. Include more CH staff in process. (EC, SP)
2. Involve all professional staff. (SE)
3. Set aside specific work time each week. (CG, PS)
4. Develop procedures checklist for documents in "hold" file. (TM)
5. Contact author and explain need for reproduction release--reject Level III only document if necessary. (EC)
6. Form selection committee to make decisions about Level III documents. (RC)
7. Use color-coded folders to identify documents in process, on hold, for transfer. (CG)

Problem: Duplicate Checking

- snags in prescreening and/or screening stage

Solutions

1. Split process into two stages: (a) preaccession, prescreening check of in-house title file; (b) postscreening check of ADR and Title Indexes for selected documents. (CE)

RIE Processing

Indexing/Abstracting

Level of Satisfaction: 4.36

Problem: Cost and Time Factors

- training new A/I's
- payment procedures
- clerical aspects, e.g., author cards, typing, etc.
- inservice training for "old" A/I's
- per unit costs

Solutions

1. Use outside consultants on a contract basis; pay by the document with a specific number of documents required per week. (CE, CG, RC)

2. Use memos and corrected work copies as appropriate; set up inservice meetings with A/I's whenever possible. (RC)

3. Make A/I responsible for entire resume--indexing, abstracting, cataloguing, author card, and scanning for further resources; provide feedback on work before final shipping. (SP)

4. Create an in-house training manual with hints and summaries of A/I rules. (CG, SE)

Problem: Implementation of ERIC A/I Guidelines

- use of mandatory leveling terms and general terms
- use of Identifier Authority List
- coordination of descriptor usage with other CH uses
- use of incorrect descriptors
- complex instructions for indexing
- changes by Facility without consulting CH
- indexing from memory rather than the Thesaurus
- discrimination among closely related descriptors
- quality control
- time necessary for writing quality abstracts

Solutions

1. Hold frequent staff meetings and working sessions. (CS)
2. Have A/I's review and critique each other's work to delete excessively general terms and to maintain consistency. (EC, PS)
3. Use mandatory leveling terms on more documents. (PS)

4. Coordinate indexing with other CH's in instances of borderline or overlap in document scope; consult as necessary. (PS)

5. Institute computerized edit program for "catching" incorrect descriptors. (EC)

6. Use staff with a library/information science background; experience suggests they tend to produce higher quality indexing after very little training. (TM)

7. Write to Facility and monitor about appropriateness of indexing changes without CH consultation. (EA)

8. Send corrected worksheets back to A/I's and write memos to all A/I's when Facility notes specific problems. (CG, SO, SP)

9. Allow A/I's enough time to write; avoid arbitrary standards of production. (JC)

10. Have Director review all work on a regular basis. (SE)

RIE Processing

Cataloguing

Level of Satisfaction: 4.6

Problem: Staff Time and Effort

- training
- reviewing
- consistency

Solutions

1. Suggest a day-long training session by Facility for all CH cataloguers. (EC)
2. Check Facility printouts and/or monthly issues of RIE. (EA)
3. Have A/I's complete entire resume to assure close look at each aspect in comparison to the document. (SP)
4. Mass produce forms for large conferences (such as AERA) with note field information already typed in. (TM)

Problem: Use of ERIC Processing Manual

- insufficient detail in Manual
- lack of examples in Manual
- lack of feedback on changes from Facility
- idiosyncratic problems with fugitive documents, e.g. borderline issues regarding COSATI rules, subtitles, report #'s, GEO field
- confusion in correct title entries
- conformity and consistency

Solutions

1. Make one person responsible for all cataloguing to maintain consistency. (CG, SE)
2. Keep small notebook to record Facility phone instructions about cataloguing style requirements or changes. (CE)
3. Request shipment/editing printouts (LIDS) from Facility for review. (CE, CG, EA, HE)
4. Develop a cataloguing form which has a space for every possible field in the order in which it will be typed. (CG, TM)
5. Call Facility for a "second" opinion on certain documents before shipping. (CG)
6. Include review of cataloguing as an "additional layer" in editing process. (IR)

7. Include a title page with all appropriate information for each document. (JC)

8. Maintain close contact with appropriate staff members at Facility. (CS, JC)

RIE Processing

Editing

Level of Satisfaction: 4.44

Problem: Conflicts between Editors and A/I's

- over-editing
- highly technical nature of documents
- lack of feedback
- disparity of writing skills among A/I's

Solutions

1. Communicate frequently with A/I's to ensure consensus on certain decisions. (PS)
2. Create content and style guidelines and writing "tips." (PS)
3. Schedule periodic meetings for A/I's and editors to discuss responsibilities. (PS)
4. Return nontrivial changes to A/I's for their agreement before input. (EC)
5. Indicate abstract mode for A/I during screening process--A/I still has freedom to change writing style provided reasons are given. (CG)
6. Use third person as arbitrator for severe disagreements. (PS)

Problem: Staff Time

- quality control
- consistency
- Identifier Authority List and cataloguing checks
- proofing
- overload of responsibility for one person

Solutions

1. Set up several levels of editing: (1) edit before typing/keying; (2) double proof; (3) have associate/assistant directors check and possibly edit. (CS)
2. Ease pressure by dividing work between two editors. (PS)
3. Rotate proofing among processing staff. (HE)
4. Try to schedule adequate time for IAL and cataloguing checks as well as editing of abstracts. (HE, JC)
5. Have Director review work periodically to check consistency. (SE)

RIE Processing

OCR Typing

Level of Satisfaction: 4.75

Problem: Corrections

- sporadic feedback from Facility
- questions about the "finer points"

Solutions

1. Contact Facility after reviewing edited printouts (LIDS). (CG)
2. Make notes on the resume form about recurring problems and ask Facility to explain how the problem should have been handled. (JC)

Problem: Identification of Alternatives

- better ways to submit information
- cost factors

Solutions

1. Use a word processor. (IR, SO)
2. Institute direct keying to tape. (EC)
3. Teletransfer resumes via computer. (SP)

Problem: Volume/Flow of Materials

- staff time
- poor handwriting
- lack of a backup person
- conflicts between shipping and typing deadlines for abstracts

Solutions

1. Use more than one typist. (SE)
2. Consider the use of dictaphone equipment to overcome problem of handwriting. (TM)
3. Set absolute deadline for acceptance of CIJE and RIE resumes from editors to eliminate last-minute typing pressures. (PS)
4. Train others to proof OCR forms. (CG)

RIE Processing

Shipping/Mailing

Level of Satisfaction: 4.89

Problem: Arrival Requirements

- coast-to-coast shipping
- determination of appropriate shipping day
- cost

Solutions

1. Mail ahead of usual schedule to make sure ADR and/or resumes arrive on time. (JC)
2. Mail during mid-week to assure proper arrival of shipments. (RC)
3. Suggest a need to investigate costs of shipping as postal rates increase. (SE)

Problem: Staff Responsibility

- lack of a backup person
- vacation periods

Solutions

1. Cross-train staff, especially administrative associate, secretary, and coordinator of document processing. (HE)

2. Package resumes and documents ahead of time with post-dated log sheets for vacation periods--plan on extra work to get this feat accomplished. (CG)

3. Have organization or sponsor do the mailing. (CS)

Problem: Work Flow

- completion of author cards
- keeping track of copyright release arrangements

Solutions

1. Use weekly deadline to keep on a regular schedule. (TM)
2. Complete author cards at the same time as resume. (SP)
3. Instruct the person who looks up copyright arrangements to note the level and authorizer name in resume worksheet, so that the person who prepares the shipment does not have to look up that information again. (SP)

RIE Processing

Communication with RIE Authors

Level of Satisfaction: 4.3

Problem: Acceptance and Announcement of Materials

- length of time between receipt of document and announcement in RIE
- determination of amount/frequency of communication
- inconsistency in notifying authors about status of documents

Solutions

1. Contact authors to explain ERIC system. (SE)
2. Warn authors that documents may take six months to enter database. (IR)
3. Let each author know status of his/her document within two weeks of receipt. (CG)
4. Devise form letters about status categories (accepted, accepted conditionally, and transferred) and send to each author. (JC)
5. Copy off author addresses from notification cards when weekly shipment is prepared. (SP)

Problem: Complimentary Microfiche

- keeping track of author addresses
- value of this effort

Solutions

1. Redesign resume workform to include address space--CH-numbered file also facilitates assembling announcements at later date. (CE)

2. Type mailing labels from information on author notification cards. (SP)

3. Type envelope with CH number in corner and author name/address when weekly shipment is being prepared; file envelopes by CH number. (CG)

4. Include explanatory letter with each complimentary microfiche to author. (CG)

Problem: Document Quality Control Issues

- reproduction releases
- reproducibility
- inappropriate formats
- tracking documents throughout processing

Solutions

1. Keep in-house author and title card index to track documents through processing. (CG)
2. Educate authors with CH blurb and the CERIC brochure about their rights in terms of copyright laws. (RC)
3. Develop a form letter about the reproducibility issues. (HE)
4. Use CH brochures and written/phone communications to decrease format problems. (EC)
5. Include reproduction release form and brochures with each solicitation letter. (CG, EC)

Problem: Types of Letters

- rejections
- reproduction release requests
- follow-up
- acceptances

Solutions

1. Develop form letters for documents that are accepted, accepted conditionally, or transferred. (CG, JC)

2. Notify author of acceptance when document is shipped; include information about the receipt of complimentary microfiche. (PS)

3. Send carefully phrased, personalized rejection letters to maintain good relations with authors. (JC, PS, SO)

4. Request reproduction releases only twice, three weeks apart. (PS)

5. Indicate on reproduction release form whether second or third request. Add a "P.S." on the third indicating that CH assumes first two were lost--also use phone calls. (EA)

RIE Processing

Record Keeping

Level of Satisfaction: 4.6

Problem: Organization of Files

- manual tracking of documents
- computer record maintenance
- efficiency
- statistics gathering
- accessibility

Solutions

1. Set up filing system of RIE authors, documents, and evaluators. (CS)

2. Make files accessible to entire staff. (PS)

3. Coalesce several forms into one multiple part form. (EC)

4. Keep three card files: "on order," "in process," and "rejected" or "transferred." Also keep three document files: "waiting" for better copy, missing pages, etc.; "waiting for release"; and "ready for shipment" (file copy waits for shipment to the Facility while the other copy is abstracted). (PS)

5. Color code a six-part accession form: (1) white=accession # file and record of final disposition; (2) blue=author file; (3) green=title file; (4) yellow=in process file; (5) pink=ADR, transfers (for statistics); (6) gold=editing slip used later for exemplary file and other acquisitions purposes. (CE)

6. Use manual files to retrieve documents in process--contributor, institution, transfer, numerical accessions, and in-process. (JC)

7. Centralize all "holding" files in one space/office. (RC)

8. Maintain author, title, hold, and transfer files. (CG)

9. Use colored folders to identify document's status; i.e., a different colored folder for transfers, holds for better copy or reproduction release, holds for more information, and accepted documents. (CG)

10. Make duplicate check only before abstracting/indexing or only when better copy/reproduction release arrives. Also arrange documents in alphabetical order for duplicate checking efficiency. (SP)

11. Use computer program to eliminate ADR problems and to track documents. (SP)

12. Cross-train staff to provide backup support. (HE)

13. Put accepted title and author records on computer. (RC)

14. Keep comprehensive notebook of solicited document sources (conferences, etc.) and unsolicited documents (Facility, CH, etc.) to make gathering statistics easier. (CG)

Problem: Transfer of Documents

- staff time
- tracking
- backlogs

Solutions

1. Switch transfers to "top priority" to prevent backlog. (SP)
2. Collect transfers in a very visible basket and send out once a week. (RC)
3. Use colored folder for all transfers--keep separate card file for all transfers, including author, title, date of transfer, and CH recipient. (CG)

RIE Processing

Training Indexers/Abstractors

Level of Satisfaction: 4.13

Problem: Costs and Time

- use of computer as training tool
- staff involvement
- selection of A/I's

Solutions

1. Use outside consultants who agree to do the training on their own time, working through the A/I Workbook with a supervisor. If they sign a monthly contract, they receive a lump sum for the training time. (CE)

2. Use A/I Workbook. (All CH's)

3. Use in-house manuals and guidelines. (CG, SE)

4. Have other staff double up on tasks until new staff has A/I tasks under control. (SP)

5. Train abstractors to do computer searching. (SO)

6. Hold a group meeting of potential A/I's and have them complete a few sample exercises to assess their abilities and interests. (CG)

7. Select candidates who can write well, are responsible, and have good analytical abilities, such as students from graduate schools of education or library science. (JC)

Problem: Inservice Efforts to Develop Skills

- poor writing abilities
- specialization in indexing
- consistency
- information overload
- feedback

Solutions

1. Provide constant feedback from editing. (All CH's)
2. Allow time for practice and immediate feedback. (PS, TM)
3. Have Associate Director and Director conduct reviews of work. (SE)
4. Use memos, copies of relevant "everything," and hold occasional meetings. (RC)
5. Return copies of edited resumes to A/I's. (CG, HE)
6. Review ERIC Processing Manual. (PS)

CIJE Processing

Level of Satisfaction: 4.42

Problem: Selection of Articles

- selective vs. full coverage
- too many journals and annotations
- "one-shot" journals
- cutbacks
- length of annotations

Solutions

1. Make all selections selectively rather than cover-to-cover; put "theme" issues in as one article. (CG, EC)

2. Suggest the need for a CIJE Title Index for duplicate checking. (HE)

3. Review "one-shot" journals carefully to make sure good articles not neglected. (HE)

4. Suggest a need to review the 50-word annotation length. (SP)

5. Determine cutbacks from information on a chart that includes: (1) subscription method (complimentary, paid, exchange); (2) last issue received; (3) UMI availability; (4) number of libraries subscribing; (5) number of times published for last two years; (6) number of issues in CIJE; (7) number of total articles in journal issues; (8) number of articles selected. (FL)

Problem: Turnaround Time

- late journals
- weekly shipments
- staff vacation breaks
- tracking journals
- cost

Solutions

1. Select articles in one day. (EC)
2. Place clearly marked CIJE baskets everywhere to alert in-house people to move contents along each day. (RC)
3. Suggest the option of mailing once a week whenever the shipment is ready. (UD)
4. Post a wall chart showing when journals arrive, who is responsible for annotations, and when shipped. (CG, JC, PS)
5. Assign all tasks to one person to speed up process. (CG, SP)
6. Stagger vacations for consultants and staff to maintain work flow. (SE)
7. Develop workform with: (1) ultimate shipment date highlighted at top; (2) initial and date by each journal handler; (3) number of articles to allow for projections of number of annotations per journal per year. (CE)

Computer Searching

Level of Satisfaction: 4.38

Problem: Costs/Record Keeping

- billing/accounting
- staffing
- training
- scheduling
- A/I training

Solutions

1. Schedule appointments only during specific time blocks. (CG)
2. Develop internal accounting procedure. (HE)
3. Hold inservice workshops to train all professional staff. (PS, TM)
4. Run searches during low usage times, e.g., when East Coast is "off-line." (EA)
5. Pay for in-house searching through revolving account. (PS)
6. Evaluate services from patron evaluation forms and chart of collected patron fees. (CG)

Problem: Search Negotiations/User Contacts

- vague questions
- search strategy development
- citation retrieval
- referrals
- keeping on top of the Thesaurus
- manual vs. computer services for users

Solutions

1. Insist on in-person or telephone negotiation. (CE)
2. Reduce turnaround time when user services specialist is out of town or busy with other tasks--train others. (SP)
3. Refer all non-scope questions to other CH's or search services. (TM)
4. Allow time for searcher to study Thesaurus to provide quality searches. (RC)
5. Develop negotiating form to use for search negotiations. (RC, SO)
6. Train secretaries to screen all search calls and use Directory of ERIC Search Services to help clients locate nearby and/or less expensive services. (CG, EC)

7. Develop a "Research Set" of Pubtypes 143, 070, 071 plus all citations with research in their descriptors to provide comprehensive searches or research. (EA)

8. For difficult high interest searches, run search, hand select relevant citations, and save copies. When requests come, send a copy along with an update of new citations. (EC)

9. Emphasize differences between manual and computer searches at time of search request. (JC)

Vocabulary Review

Level of Satisfaction: 4.27

Problem: Development of New Terms

- complex forms
- gathering input from staff and users
- disposition of materials from earlier project
- confusion about compound terms and related terms

Solutions

1. Suggest a need to develop a policy for compound terms and a definition for related terms. (IR)
2. Photocopy forms sent in monthly EAB's and ask each staff member to complete them; have vocabulary review representative tabulate results. (EA)
3. Investigate the disposition of materials not put in current edition of Thesaurus. (IR)
4. Use new Identifier Authority List with postings to determine priorities for descriptor creation. (HE)

Problem: Staffing

- priority among other CH functions
- time requirements

Solutions

1. Have entire writing/professional staff participate. (CS, HE)
2. Circulate VRG forms to A/I's for feedback. (EA, SO)
3. Allot time each month for review of Thesaurus displays and recent RIE and CIJE postings. (JC)
4. Use procedures established in early Vocabulary Improvement Program, i.e., listing and prioritizing descriptors, using log sheets for managing work, collecting reference books, etc. (CE)
5. Review EAB at first staff meeting after arrival. (TM)

Facilities/Equipment

Level of Satisfaction: 4.3

Problem: Equipment

- photocopying system
- cabinet space
- sound quality of FTS line
- age/efficiency of equipment
- acquisition of better equipment
- maintenance

Solutions

1. Purchase copier to improve document legibility for ERIC reproduction and to meet in-house needs. (EA)
2. Work with vendors to explain need for proper, prompt service. (SE)
3. Contact local FTS facility to check sound level controls. (SO)
4. Demonstrate ways for use of new equipment as well as importance of locating it in-house. (JC)
5. Investigate support possibilities from host organization or university. (SE)
6. Use word processor to store information and alter as necessary for yearly/quarterly reports. (FL)

Problem: Facilities

- space
- location

Solutions

1. Work with host organization or university to increase office space. (SE)

2. Take advantage of prime space location by tapping into faculty/student traffic. (CG, PS)

User Services

Products

Level of Satisfaction: 4.53

Problem: Currency of Products

- outdated resource lists (bibliographies)

Solutions

1. Reduce number, expand length, update every six months. (FL, PS)
2. Advertise more widely; include order blank to facilitate ordering. (CG, PS)
3. Review search carefully to eliminate citations not "on target." (FL)

Problem: Dissemination vs. Costs

- increase in numbers and distribution without increase in costs

Solutions

1. Develop cooperative arrangements with professional associations to assume printing, reprinting, and distribution costs. (CE, CG, JC)

2. Use office copier rather than formal printing services. (HE)

3. Print bibliographic series directly from Lockheed's computer output. (CG, TM)

4. Use dry transfer lettering for covers of some products (very cheap). (TM)

5. Use more in-house talent; have various CH staff volunteer to take responsibility for developing flyers, fact sheets, bibliographies as part of regularly scheduled duties. (CG)

6. Share costs with related professional organizations on a cost-recovery basis. (CG)

7. Establish priorities for various user services products, e.g., professional-looking publications list; include cost in budget and eliminate something less cost-effective. (CG)

8. Type instead of typeset some user services products. (CG)

9. Reduce outside author fees. (CG)
10. Charge for newsletters and fact sheets. (SE)

Problem: Inventory Control

- proliferation of total number of products
- large inventory of outdated products
- continuing popularity of older products

Solutions

1. Have staff review products before each new budget year begins to decide which ones to drop (according to user response and/or sales). (CG)

2. Send outdated or closed-out products in quantity to various conferences for freebie table; put them out as freebies in the CH; include them in packets at conventions. (CG)

3. Maintain tight inventory control; have one staff person responsible for keeping track of existing quantities. (CG, PS)

4. Keep ongoing, accurate records of number of products printed and distributed during each contract year. (CG)

5. Make realistic decisions on number to print, based on previous experience; print smaller quantities. (CG, EC)

6. Eliminate price on all user services products. (PS)

7. Include notice of limited availability date on ordering information. (EC)

Problem: Mailing Lists

- set-up of lists
- establishment of targeted audiences/readers

Solutions

1. Create mailing list application cards that include professional position of requestor; identify various categories of users and computerize this information. (CG)
2. Obtain mailing lists of various related professional organizations. (CG, JC)
3. Combine CH mailing list with other related computerized mailing files. (CE)
4. Create a special mailing list of people to whom products are sent. (CS)

Problem: Topic Selection for Off-the-Shelf Items

- wide variety of items requested by users
- decision-making on topics, especially for mini-bibs

Solutions

1. Have user services specialist draw up frequently-asked questions list. (SP)
2. Obtain input from staff and advisory boards on topic selection. (SE)
3. Have previous authors review searches and select 10-12 best citations. (Reward: Author keeps the search and has name printed on mini-bib as compiler.) (FL)

User Services

Question Answering

Level of Satisfaction: 4.48

Problem: Responses to Questions

- use of form letters
- referrals
- statistics keeping
- turnaround time

Solutions

1. Develop an "all-purpose" form letter for routine requests. (TM)
2. Develop linkages with other information providers. (CE)
3. Identify local referral sources, such as public or university library. (CE)
4. Refer document requests to EDRS. (CE)
5. Write brief notes on a standard enclosure slip using a felt tip pen to match printing on slip--creates a professional-looking note. (EA, RC)
6. Photocopy addresses from ERIC Directory of Microfiche Collections for nearby collections. (CG, EA)
7. Develop a simplified record-keeping procedure--review quarterly report format for statistical needs. (SP)
8. Develop a multi-purpose packet of CH/ERIC materials. (EC)

9. Use small note paper that obviates need for typing a letter. (RC)

10. Establish a Coordinating Board composed of scope area researchers and information coordinators to identify issues, questions, and ways CH can serve users. (HE)

11. Offer off-the-shelf items as ready-made information resources. (HE)

Problem: Staffing

- training new staff
- conference travel
- inservice training
- time
- volume of requests

Solutions

1. Develop a guide or packet to reflect CH role, functions, focus, scope area, etc. for staff and/or users. (PS, SE)

2. Set schedule of inservice training and set aside time for new staff to work with patrons in Learning Resource Center. (CG)

3. Train receptionist to answer and screen calls. (CG)

4. Investigate the use of interns from graduate school of education to assist with question-answering. (JC)

User Services

On/Off-Site
Workshops/Orientations

Level of Satisfaction: 4.55

Problem: Off-Site Workshops

- publicity
- number of participants
- over-concentration on Standing Order Customers
- getting materials to workshop
- travel funds

Solutions

1. Broaden workshops to include professionals, students, etc. in scope area. (SP)
2. Charge for workshops. (SE)
3. Send brochures and other information if travel is impossible. (HE)
4. Cosponsor conferences with other CH's to share costs. (HE)
5. Identify location of professional association meetings and be sure to exhibit locally. (HE)
6. Encourage organizations to support ERIC staff travel. (CE, CG)
7. Arrange materials and consultation to support workshops conducted by others. (CE)

8. Include pre-registration form in workshop announcements; specify minimum number of participants; ask registrants to rank possible workshop topics. (EC)

9. Obtain a formal listing in conference program as early as possible. (JC)

10. Train stable (long-term) members of liaison professional associations to conduct ERIC workshops. (CERIC)

Problem: On-Site Workshops

- numerous requests
- cost
- staffing
- time

Solutions

1. Divide responsibility among several staff members. (CG, PS)
2. Review and make better use of all ERIC audio-visual materials. (PS)
3. Allow professors to borrow ERIC audiovisuals and then bring students on-site for a brief visit. (RC)
4. Use audiovisual materials and other resources already developed by other CH's. (TM)

IAP'S

Topic Selection

Level of Satisfaction: 4.47

Problem: Criteria for Selection of Specific Topics

- determination of relevance, currency, and appeal
- decisions about priorities
- adequacy of data base (ERIC & others) for desired topics
- development of topic

Solutions

1. Consult advisory board and professional associations (e.g., ask members to rank topics featured in off-the-shelf items); solicit staff input. (All CH's)
2. Survey user services requests received by CH and by educational service agencies (e.g., SMERC and RISE). (TM)
3. Look at trends in acquisitions. (CG)
4. Scan recent literature. (TM)
5. Establish more liaisons with user services. (PS)
6. Experiment with practice application papers and extensive reviews for targeted audiences. (CE)
7. Run preliminary searches of data bases. (CE)
8. Work with prospective authors. (CE)

Problem: Identification of Issues Within Scope

- inadequate knowledge of materials other than ERIC input
- overlap with other CH's
- suitability for "packaging" for review and synthesis

Solutions

1. Set aside time for staff reading and discussion of published literature. (PS)
2. Rely on director's expertise. (PS)
3. Attend conferences and workshops for direct contact with field. (SP)
4. Slant issues toward users. (SP)
5. Run preliminary computer searches and consult with authors. (CE)

Problem: Lack of Plan or Program for Selection

- *ad hoc* nature of decision-making process

Solutions

1. Develop systematic program for products and services. (EC, HE)
2. Organize consultations with advisory boards and professional associations. (All CH's)

IAP'S

Procuring of Authors

Level of Satisfaction: 4.14

Problem: Inadequacy of Rewards

- low or no payment
- prestige factors

Solutions

1. Provide bonus for meeting deadlines. (IR)
2. Use young scholars or unestablished authors. (CE, RC)
3. Avoid necessity of costly new research by asking authors in other disciplines to interpret their work for CH scope. (PS)
4. Promote products. (SE)
5. Build prestige of ERIC publications through commercial arrangements (e.g., issue IAP's in hard cover series). (PS)
6. Provide authors with selected supply of products for their own use. (EC)

Problem: Quality/Ability of Authors

- identification/development of skills in review, syntheses, and practical application
- location of unknown subject specialists with something new to say
- abundance of unskilled or unknowledgeable "volunteers"

Solutions

1. Survey professional literature. (CE)
2. Identify especially good ERIC documents through computer search or routine screening. (PS)
3. Ask authors in other disciplines to interpret their work for CH scope. (PS)
4. Peruse conference programs. (PS)
5. Choose authors with good reputations and proven ability. (JC)
6. Consult advisory board and associations. (RC, SE)
7. Develop clear statement of product format and emphasis and work with authors through first draft. (PS)

Problem: Questions of Ownership and Copyright

Solutions

1. Devise and use release forms early in product development. (EC)

2. Provide authors with selected supply of products for own use. (EC)

Problem: Restriction of One-Year Time Frame

- high pressure to produce
- inability to complete assignment
- staying on schedule, especially for authors separated geographically
- loss of well-known field authorities

Solutions

1. Write bonus into stipend if deadline is met. (IR)
2. Space out payments for commissioned authors. (SP)
3. Use young scholars with more time at their disposal. (CE, RC)
4. Apply gentle pressure to tardy authors. (CG)

IAP'S

Editing

Level of Satisfaction: 4.4

Problem: Deadlines

- interruptions in editor's workday by visits from local authors
- scheduling
- turnaround time

Solutions

1. Use mailboxes as drop-off for materials from local authors to decrease interruptions--also try to provide feedback as quickly as possible. (PS)
2. Use word processor. (SE)
3. Hire part-time editor, if possible, to assist editors in meeting deadlines. (RC, SE)
4. Tighten scheduling process. (PS)
5. Hire free-lance editors to cut costs--they have done a top-notch job. (HE)
6. Use an elaborate form system to control turnaround time. (HE)
7. Use wall chart to monitor progress of each publication. (CG)

Problem: Quality Control

- marginal papers (good content, poor writing, etc.)
- definition of responsibilities of authors vs. editors
- writing styles

Solutions

1. Specify areas of responsibility, i.e., author responsible for content, editor responsible for style. (PS)
2. Put more burden on authors to rewrite/expand. (PS)
3. Develop a style sheet for authors. (IR)
4. Submit edited manuscript to author for approval. (CG)
5. Remain sensitive to author's feelings and style, even if manuscript is a disaster. (CG)

IAP'S

Publishing/Printing

Level of Satisfaction: 4.27

Problem: Costs

- bidding processes
- demands vs. budgets
- co-publishing agreements

Solutions

1. Have a designated CH member act as liaison, particularly when low bid made by out-of-state printer. (RC)
2. Attempt to foster ongoing relations with printers and graphics contacts. (CG)
3. Have professional organizations print copies of CH products or incorporate products in their journals to meet demands. (EA)
4. Use competitive bidding process. (SE)
5. Develop co-publishing agreements with professional associations/sponsors. (CS, SO)
6. Suggest a need to identify examples of successful co-publishing agreements with a variety of publishing groups. (SP)

Problem: Quality/Quantity Control

- adequacy/clarity of specifications
- determination of number to print

Solutions

1. Tend to print 100 copies of each unless co-publishing arrangements exist. (SP)
2. Hire, if possible, person with expertise in publications area. (SE)
3. Use forms which detail printing specifications/ requirements. (PS)

Problem: Scheduling

- meeting deadlines
- working with GPO
- time lags with printers

Solutions

1. Keep on top of deadlines by posting a highly visible wall chart with due dates, etc. (CG)
2. Set up drop-off boxes containing forms which are completed along with printing specifications. (PS)
3. Have printer communicate (in advance) any times for vacation so that CH staff can forecast printing requirements. (PS)
4. Explore use of local or university printers as alternative to GPO. (JC)

IAP'S

Marketing/Sales

Level of Satisfaction: 3.62

Problem: Management of Sales

- staff coordination
- increase in inventory

Solutions

1. Appoint one staff member to oversee all aspects of publications. (CG, PS)
2. Analyze buyers and non-buyers. (SE)
3. Maintain selective mailing lists. (SE)

Problem: Publicity/Exposure of Publications for Sale

- lack of expertise
- lack of funds

Solutions

1. Distribute flyers at conferences and conventions. (CE, CG)
2. Purchase advertisements in key professional journals. (EA)
3. Send review copies to professional journals. (EA, JC)
4. Send news releases to professional journals. (EA)
5. Provide complimentary copies to organizations for notification of members. (JC)
6. Include publications list with each filled order. (TM)
7. Develop professional eye-catching brochures and product covers. (CG)
8. Utilize marketing programs of co-publishers and professional organizations. (CS, EC, JC)
9. Invite marketing experts to Technical Meetings. (PS)
10. Do mass mailings and/or special mailings to targeted groups. (CG, HE)
11. Work with marketing director to develop plan for each paper. (CE)

12. Consult authors for marketing suggestions. (CE)

13. Develop revolving account to support sales. (SE)

14. Make decisions to sell materials with wide appeal and to distribute/give away materials with limited appeal. (EC)

IAP'S

Inventory Control

Level of Satisfaction: 3.85

Problem: Physical Storage

Solutions

1. Purchase storage cabinets that can be locked. (SO)
2. Centralize location of all sales products. (CG)

Problem: Record Keeping

Solutions

1. Compare actual numbers on-hand with sales records on regular basis. (CG, SO)

2. Limit access to materials to Publications Assistant. (SP)

3. Communicate frequently with "order-fillers." (PS)

4. Set up files to reflect source of order. Use separate file card for each publication which contains information on buyers, number sold, number of complimentary copies, etc. (PS)

5. Shelve publications so that numbers left can be readily seen. (JC)

6. Maintain lists of publications and their ED numbers for out-of-print materials. (JC)

7. Keep track of numbers by noting frequency and quantity of materials transferred from storage building to CH. (RC)

Professional Linkages

Level of Satisfaction: 4.18

Problem: Outreach Efforts

- insufficiency of staff and/or funds
- follow-up and follow-through
- monitoring changes within field
- number/breadth of scope areas
- contacts with professional organizations during leadership changes
- quantity of requests and demands

Solutions

1. Hold offices within professional organizations. (CG, HE, JC)
2. Announce papers from conferences as mini-collection in RIE. (HE)
3. Work with EDRS to provide inexpensive microfiche packages of conference papers to professional association members. (HE)
4. Make systematic linkages to cover various scope areas. (CE)
5. Present workshops and exhibit booths at conferences. (All CH's)
6. Request support from professional organizations for publications and/or conference travel. (SE)

7. Encourage individual contacts by professional activities of staff. (TM)

8. Establish ongoing review of IAP's with professional associations. (SO)

9. Renew acquisitions arrangements periodically. (SO)

10. Use staff meetings to brief members on trends within the field. (PS)

11. Send different staff members to ERIC technical and professional staff meetings. (PS)

12. Increase phone and mail contact. (PS)

13. Set up committees of evaluators from professional associations. (CS)

14. Use expertise of advisory commission members. (CG)

15. Cosponsor publications with professional associations. (All CH's)

16. Write regular newsletter/journal columns for professional association publications. (All CH's)

17. Encourage professional associations to reprint user services products. (CE)

18. Be selective in choosing journals/newsletters for staff-developed articles if demands for standing columns are too great. (CE)

19. Restrict the number of joint publications for each professional organization in order to involve as many organizations as possible. (EA)

20. Involve professional organizations in product planning and development and in advisory capacities. (EC)

21. Help with mailings for annual meetings and then use same list for acquisitions. (JC)

22. Develop a scope area directory to provide an overview of field. (RC)

Support Sources

Level of Satisfaction: 4.76

Problem: **Financial Support**

- cost sharing
- business office relationships

Solutions

1. Use services of host institution or organization as much as possible. (All CH's)
2. Hire outside consultants to help with overhead costs. (CE, CG)
3. Employ part-time accountant to monitor/speed up accounting and billing procedures. (RC)
4. Work closely with university administration. (SE)

Special Projects

How Determined

Level of Satisfaction: 4.08

Problem: Funding and Staffing

- lack of resources
- lack of clarity in ERIC system priorities
- timing of receipt or request of funds

Solutions

1. Use brainstorming sessions to elicit ideas. (CG, SO)
2. Get input from advisory board. (SP)
3. Seek funding from non-NIE sources. (SE)
4. Survey the field for needs. (SE)
5. Check with university personnel to see what they will support. (SE)
6. Monitor comments from workshop participants. (EC)
7. Examine overall system. (EC)
8. Suggest a need to develop a list of ERIC system priorities and then have CH's develop appropriate proposals. (CE)

Special Projects

How Assigned

Level of Satisfaction: 3.98

Problem: Staffing

- limited time
- limited funds
- identification of staff members' skills

Solutions

1. Identify interests and capabilities. (SE)
2. Make sure that projects are carried out with full-time permanent staff so that changes in part-time staff do not interfere. (JC)
3. Look at staff skills as well as time which staff member(s) can "carve out" of usual schedule. (RC)

Budget Management

Level of Satisfaction: 4.48

Problem: Fiscal Issues

- limited funds even for required items
- projection of unforeseen changes, e.g., inflation rates
- cost effectiveness
- task analysis
- interface with university or sponsor

Solutions

1. Use host organization services whenever possible--some may offer assistance in projecting for inflation rates. (CE, CS, TM)
2. Develop a manual system for monitoring "encumbered" funds. (EC)
3. Develop a special form for processing task analysis that incorporates baseline data gathering (called a SelProTiDa). (RC)
4. Explore cost-sharing opportunities. (PS)
5. Maintain flexible attitude toward money management/ expenditures. (PS)
6. Encourage interested professional organizations to contribute to mailing or printing. (JC)
7. Review monthly budget printouts. (CE)
8. Develop related projects to assist with costs. (SE)

Advisory Board

Level of Satisfaction: 4.16

Problem: CH/Advisory Board Relationships

- maintaining contacts
- insufficient input/feedback from advisory board members

Solutions

1. Use frequent phone calls and letters. (JC, SE)
2. Send each member selected portions of monthly RIE input, proposal summary, annual and quarterly reports, IAP's, and other CH products. (RC)
3. Mail an "Advisory Board Alert" newsletter twice a year. (PS)
4. Present charts and tables of documents and journal articles in ERIC system from each of the organizations represented on the board. (EA)

Problem: Costs

- travel expenses
- group meetings

Solutions

1. Meet at conventions. (CE, CG, HE, PS, SE)
2. Limit size. (CE)
3. Set up alternate-year meetings. (SE)
4. Use personnel from host organization. (EC)

Staff Development

Staff Meetings

Level of Satisfaction: 4.25

Problem: Agenda

- determination of items
- determination of priorities

Solutions

1. Plan ahead and incorporate concise reporting, attention to EAB action items, and development of project ideas. (PS)
2. Hold inservice sessions on computers and education, writing, and staff development. (PS, TM)
3. Set up inservice day for secretarial training. (SO)
4. Hold monthly meetings to discuss EAB. (HE, SO)

Problem: Scheduling Factors

- determination of time and frequency

Solutions

1. Hold total staff meeting as needed--impetus from any member. (EC, SP)
2. Schedule meeting of CH department heads on biweekly basis; then they hold meetings as necessary. (EC)
3. Hold staff meetings frequently, especially "mini-meetings." (SO)
4. Have an annual advance (retreat) away from CH to plan. (CG)
5. Meet more often during periods of extensive travel by staff members. (JC)

Staff Development

Staff Turnover/Hiring

Level of Satisfaction: 4.08

Problem: Opportunities for Advancement

- lack of career ladders
- graduate student turnover

Solutions

1. Consult with CH staff and others. (PS)
2. Hold inservice seminars. (CG, PS)
3. Provide some job rotation for learning opportunities and regular reinforcement. (PS)
4. Use teaming approach. (CE)
5. Hire consultants (local people) to provide continuity. (SE)
6. Have all professional staff on university appointments to decrease turnover. (SE)

Problem: Salaries

- lack of competitive basis
- geographic location
- low level for clerical classifications

Solutions

1. Try to capitalize on staff members' commitment to CH and its users, specifically their satisfaction in seeing the ERIC database and materials used well. (JC)

Staff Development

Staff Communication

Level of Satisfaction: 4.68

Problem: Maintenance of Contacts

- updating on regular or daily basis
- out-of-work interactions
- lack of awareness of others' responsibilities
- staff size

Solutions

1. Hold biweekly meetings, annual staff advance, and route key information on a routine basis. (CE)
2. Hold frequent mini-meetings. (CS)
3. Design processing space with a three-door access triangle to facilitate impromptu meetings. (RC)
4. Schedule weekly meetings of CH management team. (EC)
5. Set aside quiet time for minimal staff interaction to accomplish specific tasks. (PS)
6. Establish system of internal checkpoints and information sharing. (SO)
7. Foster open communication among staff members. (CG)
8. Provide opportunities for out-of-work get-togethers. (CG, SP)
9. Encourage development of both professional and personal friendships within the CH. (JC)

Staff Development

Upgrading and Training in New Skills for Existing Staff

Level of Satisfaction: 4.25

Problem: Skill Acquisition and Improvement

- time
- cost
- lack of career ladders
- changes in equipment/procedures
- release time
- content vs. technical expertise

Solutions

1. Spend time one-on-one to teach and check skills. (PS)
2. Have workshops for entire staff. (PS)
3. Allow staff to take advantage of classes offered at university. (JC, RC, SE)
4. Encourage attendance at seminars, use staff training time to read journals, etc. (RC)
5. Have vendors provide training for new equipment. (SE)
6. Provide opportunities for staff to attend off-site training. (CG)
7. Train professional staff in computer searching and word processing. (SO)
8. Hold monthly staff development seminars with outside speakers. (CE)
9. Allow flexible time schedules to meet individual needs. (HE)

Problem: **Workload**

- flow and variation of work
- small number of staff
- backup assistance

Solutions

1. Train everyone to do every job to compensate for small size of staff. (TM)
2. Encourage staff members to learn other areas to help with workflow variations. (EC)

Staff Development

Training of New Staff

Level of Satisfaction: 4.14

Problem: Organization of and Approaches to Training

- systematic vs. sporadic efforts
- explanation of complicated procedures and manuals
- explanation of the "big picture" of ERIC
- time
- costs
- quality
- efficiency
- responsibility

Solutions

1. Provide structured guidance in use of ERIC Processing Manual. (EC)
2. Have newest member trained by next-to-newest member, with supervision. (PS)
3. Try to overlap new and old person for at least one week. (RC)
4. Set aside time for intensive one-on-one training sessions. (CG)
5. Allow two new people to train each other--can make significant improvement in procedures and work flow. (SO)

6. Put together handbooks about responsibilities for each position. (CG, JC)

7. Use A/I manual for training, as well as other ERIC materials. (CE, SP)

8. Provide feedback on informal basis as well as through university staff assessment procedures. (IR)

9. Use a training coordinator to ensure quality and efficiency. (CE)

10. Provide a comprehensive overview of the ERIC system to help new staff see the full ERIC picture. (IR)

Staff Development

Job Rotation/Staffing Patterns

Level of Satisfaction: 4.27

Problem: Effectiveness

- assessment
- adjustment period
- workload fluctuation

Solutions

1. Try to determine acceptable level of success in advance. (PS)
2. Set up changes on temporary basis if necessary. (PS)
3. Reassess staffing patterns when personnel changes occur. (RC)
4. Make certain that at least one A/I position is filled by a person who can write and/or edit if publications workload increases. (EA)
5. Allow departing employee to write job description for replacement. (SO)

Problem: Enrichment/Satisfaction

- training and backup
- ability/skill identification

Solutions

1. Maintain flexible staff patterns. (EA)
2. Recognize that specialization is generally most efficient for many activities. (SE)
3. Use teaming to provide opportunities for learning new tasks. (CG)
4. Cross-train staff for support and backup. (CE, HE)
5. Assign primary and secondary areas of responsibility to provide work diversity. (CE)
6. Change staffing patterns according to work emphases. (PS)

Public Relations

Level of Satisfaction: 4.13

Problem: Visibility

- maintenance of contacts with users, professional associations, etc.
- maintenance of quality of ERIC materials (products and microfiche)
- exposure, outreach
- funds
- time
- staffing

Solutions

1. Set up toll-free number for users. (CE, EC)
2. Use newsletter information dissemination resources of supporting organizations. (CE)
3. Produce non-ERIC publications with rotary account funds to help PR. (SE)
4. Work with associations to help pay for publications and conference travel. (SE)
5. Conduct outreach activities through advisory board, teacher centers, newsletter and fact sheets, international visitors, and journal article writing. (HE)

6. Attend conferences and workshops as much as possible. (All CH's)

7. Offer on-site orientations. (CG)

8. Send mini-searches to faculty for their courses. (CG)

9. Use targeted mailings. (HE)

10. Encourage institutional librarians to use ERIC hotline for computer searching assistance. (JC)

11. Prepare RIE documents to make them more readable. (JC)

12. Offer information about professional groups to users through newsletters and liaisons. (JC)

13. Send out copies of off-the-shelf items to mailing list--creates a wonderful ripple effect. (CS)